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For Interview Discussion Purposes Only

INTERVIEW JUNE 2, 2003
10:00 A.M. EDT

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Operator: Kathleen Smith   650-233-4575

<u>Document provided solely for discussion purposes in preparation for Interview</u>.

As requested by the Examiner, at the interview scheduled for June 2, 2003, applicant intends to address the rejection of the claims, including independent claims 1, 26, 30, and 41.

Since these claims are rejected primarily in view of the Macrae '237 patent, the following is provided in order to assist in recognizing the differences between the claimed inventions and the teaching in Macrae.

For exemplary purposes, independent claim 30 and dependent claim 31 are reproduced below, and certain limitations <u>underlined</u> and *italicized and bolded* to highlight differences between the claimed subject matter and that taught or suggested by Macrae.

30.   (Amended)   A method for creating a service plan and associated workflow for a customer using a computer based network comprising the steps of:

   providing electronically:

   a plurality of <u>***structured sentence data items*** for each of a plurality</u> <u>of ***possible customer needs***</u> in an electronic storage area, said plurality of structured sentence data items including structured sentence data items for services, <u>each structured sentence data item for service identifying *a*</u> <u>*needed service* corresponding to one of the possible customer needs;</u>

   <u>an electronic work flow</u> capable of assisting completion of each needed service; and

   <u>at least first and second templates,</u> each of said at least first and second templates comprising a different set of certain ones of said plurality of structured sentence data items that each relate to <u>different</u> <u>possible customer needs;</u>

   selecting at least a first template that relates to <u>an identified customer need;</u> and

   <u>***selecting*** those ***structured sentence data items*** within the first template that relate</u> to [the] a ***specific need*** of ***a particular customer***, <u>the step of selecting those structured</u> <u>sentence data items ***also causing the selection of workflow instances*** adapted to assist</u> completion of ***each needed service***.

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31.   A method according to claim 30 wherein said plurality of structured sentence data items have a subject and a plurality of attributes contained therein <u>and wherein the step of selecting those *structured sentence data items* includes the step of determining the values for a plurality of said attributes *for corresponding structured sentences*</u> in a service plan for a customer.

As described by the above claims, a structured sentence data item is used to instantiate a structured sentence using a template, and, further, the selection of a structured sentence data item causes the selection of a workflow instance, which workflow instance is separate and distinct from either the structured sentence data item or the structured sentence.

Furthermore, the attached charts illustrate differences between the Macrae system taught, and the teachings in the present application.

These charts illustrate that although Ward and Macrae use some terminology that has some overlap and have similarities regarding meta data, there are important differences in the meaning of terms and the relationships between various types of patient-specific data.

Both Ward and Macrae have meta data for services which is distinct from meta data for workflow. For both Ward and Macrae, workflow meta data takes the form of a templates for process flow diagrams. Meta data for services differ in at least two ways:
    (1) In Ward, meta data for services take the form of "structured sentence data items" comprised of a subject term, and may include one or more attribute terms that modify the subject term, while in Macrae, meta data for services take the form of a library of orderable services, without mention of a subject/attribute data structure.
    (2) In Ward, meta data for services are organized by possible customer needs (e.g. health problems), while in Macrae, meta data for services are organized by the departments that offer the services. When creating a service plan for a particular customer, and that service plan is organized by the needs of the particular customer, it is far easier to find templates with relevant services if the meta data for services is organized by possible customer needs – allowing the system to display templates appropriate the needs of the particular customer.

Ward describes a Service Plan that contains "structured sentences" that relate to a specific need of a particular customer, separate and distinct from electronic workflow instances., Macrae, in contrast, describes what is called a "Care Plan", but which takes the form of a single electronic workflow instance.

Thus, in Ward, the Service Plan is a data structure which includes a collection of structured sentences, including structured sentences for services (e.g. "orders" in health care context). Each of these structured sentences for services are associated with a customer need (e.g. a health problem) of the particular customer. These structured sentences are instantiated within a Service Plan for a particular customer based on structured sentence data items, typically selected from within previously created templates (e.g. care plan templates). The process step of selecting a structured sentence data items within such a template causes the instantiation of a structured sentence within the Service Plan for the particular customer. For each of the structured sentences for services (orders) within the Service Plan for a particular customer, the system then creates a separate instance of an electronic workflow, in the form of a process flow diagram. This method for creating workflow instances utilizes workflow metadata. The process steps in the workflow process diagram correspond to the steps of providing the service (e.g. the steps of executing a specific medical order for a particular patient).
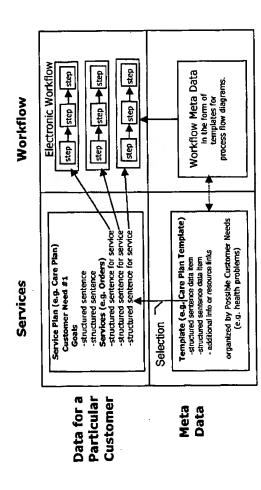
Key points about the separation of the Service Plan from Electronic Workflow instances are:

- The user (clinician) interacts with structured sentence data items to create the Service Plan or previously created structured sentences when modifying a Service Plan, not workflow process flow diagrams and associated graphical icons.
- A separate electronic workflow instance is created for each order. Therefore, the electronic workflow instance is not the Service Plan, but rather only dictates the steps of execution of a single order.
- A single Service Plan for a particular customer can be (and typically is) associated with many workflow instances.

In contrast, in Macrae, the Care Plan includes "nodes", including one or more "order nodes", each of which may contain (inside the workflow process flow diagram) one or more orders. Some key points about the lack of separation of Care Plan and Electronic Workflow in Macrae:

- The clinician must manipulate process flow diagrams and associated icons to create the Care Plan and enter or modify the orders (something that we believe to be too unfamiliar and tedious to be feasible during busy clinic sessions).
- A single workflow instance comprises the entire Care Plan. The workflow instance describes the sequence of orders, not the steps of execution of a single order.

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WARD

Data for a Particular Customer

Services | **Workflow**

Service Plan (e.g. Care Plan)
Customer Need #1
Goals
-structured sentence
-structured sentence
Services (e.g. Orders)
-structured sentence for service
-structured sentence for service
-structured sentence for service

Electronic Workflow

step → step → step
step → step → step
step → step → step

A separate Electronic Workflow is automatically instantiated for each of many structured sentences for services in a Service Plan.

User (Clinician) can create a Service Plan in a more familiar structured sentence format, without manipulating a process flow diagram.

Meta Data

Selection

Template (e.g. Care Plan Template)
-structured sentence data item
-structured sentence data item
- additional info or resource links

organized by Possible Customer Needs
(e.g. health problems)

Workflow Meta Data
in the form of templates for process flow diagrams.

MACRAE ET AL.

Data for a Particular Patient

Services | **Workflow**

Electronic Workflow (called "Care Plan"):
process flow diagram containing multiple orders inside process steps.

-order -order → -result -result → -order -order -order

Single Electronic Workflow instance embodies the entire Care Plan.

All the orders for the Care Plan stored inside a process flow diagram.

Therefore, clinician creating a Care Plan must manipulate an unfamiliar process flow diagram format.

Meta Data

Library of orderable services
organized by departments.

Workflow Meta Data
in the form of templates for process flow diagrams.